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## 2010 Fall Summit - San Diego, CA

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### Topic Legend:

- › [PM](#) - Practice Management
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- › [M](#) - Marketing

### Thursday, October 7<sup>th</sup>, 2010 - 1st Global Sessions

8:00 am - 8:30 am	Academy Metrics Speaker: <i>Al Prentice</i>
8:30 am - 9:30 am	Academy Success Stories Speaker: <i>Members</i>
9:30 am - 10:30 am	Life Insurance Industry Trends, and The Challenges to Trustees and Fiduciaries Speakers: <i>Matt Adams, 1<sup>st</sup> Global AIPG Manager</i>
10:30 am - 11:45 am	Working With a Financial Advisor to Build Value Speakers: <i>Caprice Collins and Art Husami</i>

### Thursday, October 7<sup>th</sup>, 2010 - Main Sessions

1:00 pm - 2:00 pm	Welcome and Introductions Speakers: <i>Robert Armstrong and Sanford M. Fisch</i>
2:00 pm - 3:15 pm	State of the Academy Speakers: <i>Robert Armstrong and Sanford M. Fisch</i>
3:15 pm - 3:30 pm	BREAK

3:30 pm - 5:30 pm	<b>Keynote Topic:</b> The Compound Effect--Multiplying Your Success. One Simple Step at a Time Keynote Speaker: <i>Darren Hardy, SUCCESS Magazine</i>
6:30 pm - 9:00 pm	Cocktail & Dinner Reception Sponsored by: <i>Premier Planning &amp; NGL</i>

## Friday, October 8<sup>th</sup>, 2010 - Main/Breakout Sessions

	Main Sessions	Breakout Sessions
8:00 am - 9:45 am	<b>M Topic:</b> Search Engine Optimization and Social Media Program Update Speakers: <i>Robert Armstrong and Sanford M. Fisch</i>	Attend Main Room Marketing Sessions
9:45 am - 10:00 am	BREAK	
10:00 am - Noon	<b>ED Topic:</b> Malpractice Melee: Fending Off The Disgruntled and Disappointed, An Estate Planner's Field Guide Speaker: <i>Adam Streisand, Loeb &amp; Loeb Trust and Estate Litigation Partner</i>	<b>10:00 am - 11:00 am</b> <b>M Topic:</b> Marketing Roundtable Facilitators: <i>Member Services</i>
		<b>11:00 am - Noon</b> <b>M Topic:</b> Filling The Funnel With Social Media <ul style="list-style-type: none"> <li>▶ Get The Word Out</li> <li>▶ Set-Up Accounts</li> <li>▶ Regular Posts, Tone and Topics</li> <li>▶ Share Social Media Experiences</li> </ul> Speaker: <i>Jennifer Price</i>
Noon - 2:00 pm	LUNCH BREAK	
2:00 pm - 3:30 pm	<b>PM Topic:</b> Funeral Trusts, Insurance, Medicare Supplements and Group Health Insurance Speaker: <i>Bryan Adams, CEO, Premier Planning</i>	<b>M Topic:</b> Creating A Winning Marketing Calendar <ul style="list-style-type: none"> <li>▶ Discussion and Panel</li> </ul> Facilitators: <i>Member Services</i>
3:30 pm - 3:45 pm	BREAK	
3:45 pm - 5:00 pm	<b>M Topic:</b> Success Stories Facilitator: <i>Robert Armstrong</i>	Attend Main Room Marketing Session
5:30 pm - 9:30 pm	Social Event: <b>San Diego Maritime Museum Tour and Dinner</b> \$110/person	

## Saturday, October 9<sup>th</sup>, 2010 - Main/Breakout Sessions

	Main Sessions	Breakout Sessions
8:00 am - 9:45 am	<b>PM Topic:</b> What Every Law Firm Needs To Know About Accounting and Technology Speaker: <i>Darren Root, CPA, CIIP Executive Editor - The CPA Technology Advisor</i>	<b>PM Topic:</b> Effective Post Retention Workflow <ul style="list-style-type: none"> <li>▶ Processing Retainer</li> <li>▶ CIF Routing</li> <li>▶ Document Production</li> <li>▶ Tracking Progress</li> <li>▶ Reports</li> <li>▶ Phone Final</li> </ul> Speakers: <i>Susan Russel and Lillian Valdez</i>

9:45 am - 10:00 am	<b>BREAK</b>	
10:00 am - Noon	<p><b>ED/PM Topic:</b> Don't Wait, Plan Now For Emergencies - Succession and Contingency Planning Are Essential to Protect Clients and Avoid Discipline or Malpractice</p> <p>Speaker: <i>Willis Baughman</i>, <i>Law Office Of Willis S. Baughman</i> Bill Baughman is one of the most experienced attorney risk management speakers in California. A much sought after speaker, Bill has led seminars and taught client relations, malpractice prevention, ethics and risk management for 30 years.</p>	<p><b>PM Topic:</b> Step-By-Step Final Signing Meeting</p> <p>Speaker: <i>TBA</i></p>
Noon - 2:00 pm	<p><b>LUNCH BREAK</b>  <b>Board of Governors Board Meeting</b>  <b>DocuBank New Member Lunch</b></p>	
2:00 pm - 3:45 pm	<p><b>ED/M Topic:</b> 2011 Tax - What To Do and How To Do It</p> <p>Speaker: <i>Dennis Sandoval</i></p>	<p><b>M Topic:</b> Private and Public Seminar Planning</p> <p>Speakers: <i>Susan Russel and Lillian Valdez</i></p>
3:45 pm - 4:00 pm	<b>BREAK</b>	
4:00 pm - 5:15 pm	<p><b>PM Topic:</b> The E-Myth Attorney In 2011</p> <p>Speakers: <i>Robert Armstrong and Sanford M. Fisch</i></p>	Attend Main Room Marketing Session
5:15 pm - 5:45 pm	<b>BREAK</b>	
5:45 pm - 6:30 pm	<p><b>ROUNDTABLE DISCUSSION FOR MEMBERS ONLY</b></p> <p><b>Topic:</b> <i>Effective Client Review Meetings - Marketing, Consultation and Fees</i></p>	

## Sunday, October 10<sup>th</sup>, 2010 - Main Sessions

8:00 am - 10:00 am	<p><b>M/ED Topic:</b> Continuing Education Program Update: Basic Estate Planning 12-Part Course</p> <p>Speakers: <i>Dennis Sandoval and Steve Hartnett</i></p>	
10:00 am - 10:15 am	<b>BREAK</b>	
10:15 am - 11:15 am	<p><b>ED Topic:</b> Navigating the Minefield: Naming a Trust as Beneficiary of an IRA</p> <ul style="list-style-type: none"> <li>› Use Of CounselPro™ 6.0 Language</li> <li>› Tips and Traps</li> </ul> <p>Speaker: <i>Dennis Sandoval</i></p>	
11:15 am - Noon	<p><b>ED Topic:</b> ABC Trusts</p> <p>Speaker: <i>Dennis Sandoval</i></p>	
<b>END OF 2010 FALL SUMMIT</b>		

## Sunday, October 10<sup>th</sup>, 2010 - Optional Training Sessions

### Core Curriculum I - Intro To Tax Law; Tuition - \$425

**Who Should Attend?** This fundamental program is designed for members who have not attended Core I in two or more years, or for

members who have new attorneys, staff or paralegals who have never attended Core I. This comprehensive course provides an excellent foundation for members who are transitioning from other areas of practice or who don't have an extensive estate planning background. It can also be a great review for those members who are even more experienced or desire a refresher.

2:00 pm - 3:30 pm	<p style="text-align: center;"><b>Topic:</b> Overview Of The Estate &amp; Gift Tax System</p> <p style="text-align: center;">▶ Gift Tax, Applicable Exclusion, Gift Splitting, Annual Exclusions (\$2503), Etc.</p> <p style="text-align: center;"><b>Speakers:</b> <i>Dennis Sandoval and Steve Hartnett</i></p>
3:30 pm - 3:45 pm	<p style="text-align: center;"><b>BREAK</b></p>
3:45 pm - 5:00 pm	<p style="text-align: center;"><b>Topic:</b> Disclaimers (§2518), 2010: Gifts and Deaths In The Limbo Year</p> <p style="text-align: center;"><b>Speakers:</b> <i>Dennis Sandoval and Steve Hartnett</i></p>

## Monday, October 11<sup>th</sup>, 2010 - Optional Training Sessions

### Core Curriculum I - Intro To Tax Law, Continued

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8:00 am - 10:00 am	<p style="text-align: center;"><b>Topic:</b> Estate Tax Return Overview, Calculating The Tax, Alternate Valuation (§2032)</p> <p style="text-align: center;"><b>Speakers:</b> <i>Dennis Sandoval and Steve Hartnett</i></p>
10:00 am - 10:20 am	<p style="text-align: center;"><b>BREAK</b></p>
10:20 am - Noon	<p style="text-align: center;"><b>Topic:</b> Gross Estate (§2033), Three-Year Rule (§2035), Retained Life Estates, Revocable Transfers (§§2036 - 2038)</p> <p style="text-align: center;"><b>Speakers:</b> <i>Dennis Sandoval and Steve Hartnett</i></p>
Noon - 1:00 pm	<p style="text-align: center;"><b>LUNCH</b></p>
1:00 pm - 3:00 pm	<p style="text-align: center;"><b>Topic:</b> Annuities, Joint Property, Powers Of Appointment, Life Insurance (§§2037-2042)</p> <p style="text-align: center;"><b>Speakers:</b> <i>Dennis Sandoval and Steve Hartnett</i></p>
3:00 pm - 3:20 pm	<p style="text-align: center;"><b>BREAK</b></p>
3:20 pm - 5:00 pm	<p style="text-align: center;"><b>Topic:</b> Charitable and Marital Deductions, Qualified Family Owned Business Interests (§§2055-2057)</p> <p style="text-align: center;"><b>Speakers:</b> <i>Dennis Sandoval and Steve Hartnett</i></p>
<p><b>END OF 2010 FALL SUMMIT OPTIONAL TRAINING</b></p>	

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